

**Phoenix Program
Process Definition – Purchasing Module**

Process	<i>Purchase Order Correction (Change Order)</i>
Process Number	<i>PO – 009</i> Revised 3/18/99

Description of Process

This process is used to correct a purchase order that has already been dispatched to the vendor.

Input to Process

Purchase Order

Output of Process

Purchase Change Order

Service Level Agreement Required? (if yes, provide a brief description)

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PeopleSoft Panel Groups being Used

Function	Panel Group
Create Change Order	Purchase Order
Print and Distribute Change Order	Dispatch PO

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Business Process Description

Process Description	Responsibility (Agency/Centralized)
Step 1: Buyer determines that a dispatched purchase order needs to be corrected.	Buyer
Step 2: Navigates to the "Manage Purchase Orders" menu. (Go, Administer Procurement, Manage Purchase Order).	"
Step 3: Navigates to the PO Lines panel (Use, Purchase Order, Lines, Update/Display. Selects the appropriate Purchase Order to display the PO lines panel. Clicks the "Dog" icon to display the PO lines.	"
<p>Step 4: Changes can be made to the header, lines, or schedule. Navigate to the header, line, or schedule panel and click the "change" button. This generates the Change Order Number. Make the necessary changes and save the document.</p> <p>NOTE 1: You cannot change a chartfield distribution. If this is necessary, you must cancel the distribution and insert a new row with the correct values. Changing the chartfields in this manner will not create a change order, however, you will have to re-do the chartfield approval for the PO and then run PO Edit, BCM, and dispatch.</p> <p>NOTE 2: If you are canceling a PO line, you must manually cancel the line and any "Schedules" and "Distributions" associated with that line. The line is canceled from the "Line Detail" subpanel, the Schedules are canceled from the "Schedule Detail" subpanel, and the Distributions are canceled from the "Distribution Details" subpanel.</p>	"
Step 5: Run the PO Edit process by clicking on the "Check" button at the top of the header panel. The system will instruct you to subsequently click on the "Dog" button to check the status of the process. When the panel refreshes, the process is complete. Look at the grayed out "Post Document" checkbox at the bottom left of the panel. If this box is checked, the PO Edit process ran successfully. If not checked, contact your system administrator.	"
The change order will typically be in a "Pending Approval" status. If external approval is required, wait for this to occur before proceeding to the next step. Otherwise, click on the Approval button to approve the order. DO NOT CLICK ON THE MAGNIFYING GLASS WHICH RUNS THE PO BUDGET CHECK UNTIL AFTER THE PO IS IN AN APPROVED STATUS.	"
Step 6: Once the Purchase Order is in an "Approved" status, return to the PO Header panel and use "Magnifying Glass" button to run the PO BCM (Budget Checking) process. If the BCM status displays an error, contact accounting personnel so that budget can be increased to accommodate the PO Amount. If BCM is valid, proceed to next step.	"

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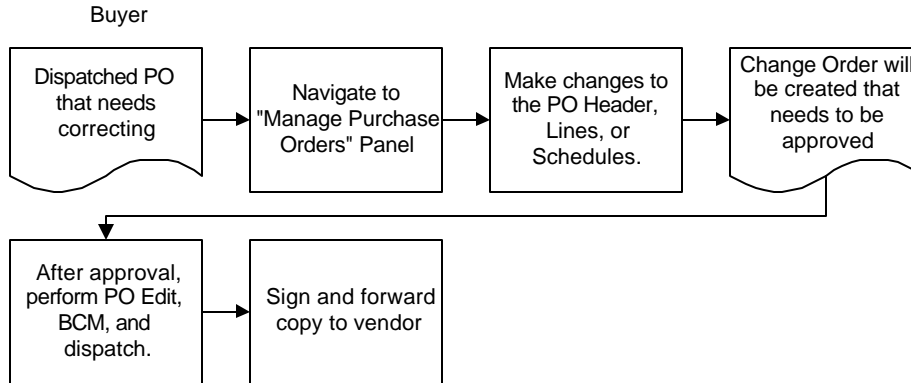
Step 7: Navigate to the “Dispatch Purchase Orders” panel (Process, Dispatch Purchase Orders, Update/Display). Select the Business Unit and Purchase Order Number. You should also select “Changed Orders” and you can check the box to indicate if you want to print the entire PO or changes only. Run the Print Process.	“
Step 8: Sign and forward one copy of PO to vendor and keep one for the Purchasing file. Make and distribute any other copies as needed.	Buyer or Support Personnel

Forms Used with Process (#)

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Process Flow Diagram (if appropriate):



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APPROVAL FORM

SIGNER	ROLE	DATE
Rick Housworth	DOAS Project Lead	3/1/99
Carol Bass	THG Project Lead	3/1/99
Kyle Morton	THG Functional Analyst	3/1/99